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Mineral Sands Outlook: Stability is the Word - What about Future Supply?

The most recent earnings releases and project updates from Mineral Sands Companies indicate stability at traditionally high price levels, particularly in the short term. New mines are experiencing variable start-up profiles, as is expected with the most recent projects. New ownership structures, including new large players from outside the industry, are 2-4 years from potential start-up dates, which always seems to be delayed. How will the expected upturn for chloride producers be supplied with chloride feedstocks, as existing mines deplete and new projects are not meeting critical milestones? How will China's growing appetite for foreign ilmenite and Mineral Sands Concentrate be met? Where actually does the Zircon market sit, and what does the short and long term future hold?

TiPMC's industry-leading ***Strategic Review and Mineral Sands Forecast*** looks at this question in detail and provides insight and analysis on the current Mineral Sands industry, and the prospects for its short and long-term future.

We explore:

- There appears to be plenty of beneficiation capacity, as smelters and SR Kilns operate at low utilization rates. Why is concern growing for long term ilmenite supply to these facilities?
- How does natural rutile availability impact both ilmenite supply and demand? What are the key projects required to meet the anticipated chloride demand needs, and how does timing impact the market for each feedstock grade?
- What project implementation are being delayed, and what is the impact on the entire TiO₂ industry?
- How fast is concentrate imports to Chinese Mineral Separation plants growing? Are some sources declining?
- Given the state of the Chinese new residential construction, how are zircon prices remaining relatively stable?

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I welcome your calls, questions and requests,



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